

REQUEST FOR PROPOSALS (RFP) NO. 15-0265
TO PROVIDE
CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM
FOR ENROLLMENT MANAGEMENT
FOR
OFFICE OF ADMISSIONS
UNIVERSITY OF HAWAII AT MANOA
HONOLULU, HAWAII

APRIL, 2015

BOARD OF REGENTS
UNIVERSITY OF HAWAII
HONOLULU, HAWAII

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NOTICE TO OFFERORS

PROPOSAL FORMS for Request for Proposals (RFP) No. 15-0265 , to provide Customer Relationship Management (CRM) System for Enrollment Management for Office of Admissions, University of Hawaii at Manoa, Honolulu, Hawaii, will be available from and received in the OFFICE OF PROCUREMENT AND REAL PROPERTY MANAGEMENT, UNIVERSITY OF HAWAII, 1400 LOWER CAMPUS ROAD, ROOM 15, HONOLULU, HAWAII 96822, no later than 2:30 p.m., **May 5, 2015**. Proposals received after the time and date fixed for submission will not be considered.

Vendors located outside the Island of Oahu, Hawaii, USA, may request a copy of the RFP to be sent via U.S. Postal Service by providing the vendor's name, address, contact person and telephone number. If express shipment is desired, requests must be submitted in writing with an account number, BILLABLE TO THE RECEIVER, and an authorized signature. Requests may be transmitted via facsimile, (808) 956-2093. Direct all questions to Glen Shiraki, telephone (808) 956-6590.

David Lassner
President, University of Hawaii

Posting Date: April 2, 2015

Vendors downloading the RFP shall be responsible for notifying the Procurement Specialist, Glen Shiraki (e-mail: gshiraki@hawaii.edu; fax: [808] 956-2093) so that the name, address, phone number, fax number, and e-mail address of the vendor can be listed on the University's register for the purpose of notification of any amendments to the RFP which are issued.

NOTICE TO OFFERORS

BUSINESS CLASSIFICATION CERTIFICATION STATEMENT

Vendors: Please complete the following information below. If you answer "No" to question No. 1, complete the certification portion and submit together with your bid document or quote.

(Terms used are taken from the Small Business Administration Rules and Regulations and the Federal Acquisition Regulation [FAR].) (Reference Section A on the reverse side of this form for Category Descriptions.)

This is to certify that the company identified below:

1. _____ IS a **small business** as defined in the Small Business Administration regulations.
(see reverse for size standards).

_____ IS NOT a small business as defined in the regulations.
(If you checked here, STOP, GO TO CERTIFICATION BELOW.)
2. _____ IS a **small disadvantaged business concern** and is identified, on the date of its representation, as a certified small disadvantaged business in the database maintained by the Small Business Administration (PRO-NET).
3. _____ IS a **women-owned small business concern** of which at least 51% is owned, controlled, and managed by one or more women; or in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women.
4. _____ IS a **HUBZone small business concern** that appears on the List of Qualified HUBZone Small Business Concerns maintained by the Small Business Administration.
5. _____ IS a **veteran-owned small business concern** of which not less than 51 percent is owned, controlled and managed by one or more veterans; or in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more veterans.
6. _____ IS a **service-disabled veteran-owned small business concern** of which not less than 51 percent is owned, controlled and managed by one or more service-disabled veterans, or in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more service-disabled veterans as defined in 38 U.S.C. 101 (16).

CERTIFICATION:

I hereby certify the information supplied herein to be true and correct.

Company Name: _____

Signature of Company Officer

Type of Goods/Services: _____

*NAICS Code: _____

Company Address: _____

Print Name: _____

Title: _____

Date: _____

Any misrepresentation shall be subject to the provisions stated in item B on the reverse side.

* North American Industry Classification System (NAICS)

- A. "SMALL BUSINESS" SIZE STANDARDS FOR FEDERAL SUB-CONTRACTORS. Small business size is determined by the primary NAICS Code. See Title 13 CFR, Part 121 to determine your NAICS Code and the threshold for determining small business (revised as of January 1, 2004).

A "small business" is a concern including its affiliates, which is independently owned and operated. It is not dominant in the field of operations in which it is selling goods and services to a federal contractor. It meets the following size criteria for its particular industry:

1. CONSTRUCTION TRADES - "Small" if average annual receipts for preceding 3 years do not exceed \$12 million.
2. CONSTRUCTION, GENERAL CONTRACTORS - "Small" if average annual receipts for preceding 3 years do not exceed \$28.5 million.
3. MANUFACTURING - "Small" if 500 employees or less, except for some specific products which will increase the complement of employees to 750 and 1,000, respectively.
4. TRANSPORTATION - "Small" if average annual receipts for preceding 3 years do not exceed the amount shown for specific services:

\$21.5 million – general freight trucking, local.
\$3 million – travel agencies.
5. WHOLESALE TRADE, DURABLE AND NON-DURABLE GOODS - "Small" if 100 employees or less.
6. RETAIL TRADE - "Small" if average annual receipts for preceding 3 years do not exceed the amount shown for specific products:

\$6 million - lumber and building materials, paints, hardware.
7. SERVICES - "Small" if average annual receipts for preceding 3 years do not exceed the amount shown for specific services:
 - a. \$21 million – computer systems design services, custom computer programming services.
 - b. \$10.5 million - refuse collection, protective guard services.
 - c. \$14 million - janitorial services.
 - d. \$21.5 million - passenger car rental
 - e. \$21 million – office Machinery and equipment rental & leasing
 - f. \$6 million - general automobile repair, refrigeration & air conditioning.
8. ALL OTHER TYPES OF BUSINESS - "Small" if 500 employees or less.

Where firm sizes are determined by annual receipts, and the concern is less than 3 complete fiscal years old, its total receipts means for the period it has been in business, divided by the number of weeks, including fractions of a week, and multiplied by 52.

- B. Notice. Under 15 U.S.C. 645(d), any person who misrepresents a firm's status as a small, small disadvantaged or women-owned small business concern in order to obtain a contract to be awarded under the preference programs established pursuant to sections 8(a), 8(d), 9, or 15 of the Small Business Act or any other provision of Federal law that specifically references section 8(d) for a definition of program eligibility, shall:

1. Be punished by imposition of fine, imprisonment, or both;
2. Be subject to administrative remedies including suspension and debarment; and
3. Be ineligible for participation in a program conducted under the authority of the Act.

SECTION 1 ADMINISTRATIVE OVERVIEW

1.1 INTRODUCTION

This is a Request for Proposals (RFP) issued by the University of Hawaii to solicit proposals from Offerors who wish to be considered to provide Customer Relationship Management (CRM) System for Enrollment Management for Office of Admissions, University of Hawaii at Manoa.

1.2 AUTHORITY

This Request for Proposals (RFP) is issued under the provisions of the Hawaii Revised Statutes, Chapters 103 and 103D. All prospective Contractors are charged with presumptive knowledge of all requirements of the cited authorities. Submission of a valid executed proposal by any prospective Contractor shall constitute admission of such knowledge on the part of such prospective Contractor.

1.3 RFP ORGANIZATION

This RFP is organized into the following sections:

Section 1, Administrative Overview -- Provides Offerors with general information on the objectives of this RFP, procurement schedule, and procurement overview.

Section 2, Scope of Work -- Provides Offerors with a general description of the tasks to be performed, delineates University and Contractor's responsibilities, and defines deliverables.

Section 3, Proposal Requirements -- Describes the required format and content for the Offeror's proposal.

Section 4, Criteria to Evaluate Proposals -- Describes how proposals will be evaluated by the University of Hawaii.

Section 5, Special Provisions -- Provides Offerors the terms and conditions under which the work will be performed.

1.4 SCHEDULE OF KEY DATES

The schedule of key dates set forth herein represents the University's best estimate of the schedule that will be followed. Any of the dates listed below may be changed at any time at the sole discretion of the Director, Office of Procurement and Real Property Management:

RFP Advertised and Issued	<u>April 2, 2015</u>
Closing Date for Submission of Questions	<u>April 13, 2015</u>
University Response to Offeror's Questions	<u>April 20, 2015</u>
Closing Date for Receipt of Proposals	<u>May 5, 2015</u>
Proposal Review Period	<u>May 5 – 15, 2015</u>
Contractor Selection and Award	<u>May 29, 2015</u>
Contract Start Date	<u>June 8, 2015</u>

1.5 SUBMISSION OF QUESTIONS

Offerors may submit questions in writing to the issuing officer. The deadline for submission of written questions is **4:30 p.m., H.S.T. on April 13, 2015**.

Offerors may call or email the Technical Representative, Ryan Yamaguchi at (808) 956-9179, or email: ryamagu@hawaii.edu for questions regarding the content of the work specifications.

1.6 SUBMISSION OF PROPOSALS

Offerors shall submit an original plus SIX (6) copies of the proposal. The total length of the proposal should not exceed 50 pages.

Proposals shall be received by the Office of Procurement and Real Property Management, University of Hawaii, no later than **2:30 p.m., H.S.T. on May 5, 2015**. Proposals shall be mailed or delivered to:

Office of Procurement and Real Property Management
University of Hawaii
1400 Lower Campus Road, Room 15
Honolulu, Hawaii 96822

Any proposal received after this date and time shall be rejected.

The outside cover of the package containing the proposal shall be marked:

Office of Procurement and Real Property Management
University of Hawaii
1400 Lower Campus Road, Room 15
Honolulu, Hawaii 96822
RFP No. 15-0265, Customer Relationship Management (CRM) System for
Enrollment Management for Office of Admissions, University of Hawaii at Manoa,
Honolulu, Hawaii
(Name of Offeror)

1.7 COSTS FOR PROPOSAL PREPARATION

Any costs incurred by Offerors in preparing or submitting a proposal shall be the Offeror's sole responsibility.

1.8 DISQUALIFICATION OF PROPOSALS

The University reserves the right to consider as acceptable only those proposals submitted in accordance with all requirements set forth in this RFP and which demonstrate an understanding of the scope of the work. Any proposal offering any other set of terms and conditions contradictory to those included in this RFP may be disqualified without further notice.

An Offeror shall be disqualified and the proposal automatically rejected for any one or more of the following reasons:

The proposal shows any noncompliance with applicable law.

The proposal is conditional, incomplete, or irregular in such a way as to make the proposal indefinite or ambiguous as to its meaning.

The proposal has any provision reserving the right to accept or reject award, or to enter into a contract pursuant to an award, or provisions contrary to those required in the solicitation.

The Offeror is debarred or suspended.

1.9 PROCUREMENT OFFICER

This RFP is issued by the Office of Procurement and Real Property Management, University of Hawaii. The Procurement Officer responsible for overseeing the contract is Duff Zwald, Director of the Office of Procurement and Real Property Management.

1.10 TECHNICAL REPRESENTATIVE OF THE PROCUREMENT OFFICER (TRPO)

The individual listed below is the Technical Representative of the Procurement Officer (TRPO):

Ryan Yamaguchi
Assistant Director
Office of Admissions
University of Hawaii at Manoa
2600 Campus Road, QLC Rm. 001
Honolulu Hawaii 96822
Telephone: (808) 956-8975
Facsimile: (808) 956-4148
E-mail: ryamagu@hawaii.edu

1.11 ISSUING OFFICER

The individual listed below is the issuing officer and the official contact for all communication regarding this RFP:

Glen Shiraki, Procurement Specialist
Office of Procurement and Real Property Management
University of Hawaii
1400 Lower Campus Road, Room 15
Honolulu, Hawaii 96822
Telephone: (808) 956-6590
Facsimile: (808) 956-2093
E-mail: gshiraki@hawaii.edu

1.12 CHANGES TO CONTRACTOR'S FEE

It is recognized that audit disallowances and other changes may require adjustments in the compensation due to the Contractor. In the event that future actions would either disallow or minimize the payments already made to the Contractor, the Contractor shall assist the University in defending the correctness of the claim for reimbursement. If the disallowance or adjustment is upheld, then the Contractor will participate in the payback to the extent the amount of the disallowance or adjustment contributed to the total fee received by the Contractor. Payment to the University shall be made within THIRTY (30) calendar days from which official notice is received by the Contractor from the University.

1.13 RFP AMENDMENTS

The University reserves the right to amend the RFP any time prior to the closing date for best and final offers.

1.14 AWARD ON INITIAL PROPOSALS

The University may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the Offeror's best terms.

1.15 AVAILABILITY OF FUNDS

Offerors are advised that the award of this contract is contingent upon availability of funds. If funds are not available, the University reserves the right not to make award of this contract.

1.16 NOTICE TO PROCEED

The University shall not be responsible for work done, even in good faith, prior to the University's Notice to Proceed unless specific provisions are made in the contract.

1.17 RFP SUBMITTALS BECOME PROPERTY OF THE UNIVERSITY

All proposals and other material submitted shall become the property of the University and may be returned only at the University's option.

1.18 CONFIDENTIAL INFORMATION

An Offeror shall request in writing nondisclosure of designated trade secrets or other proprietary data to be confidential. Offerors shall ensure that such data so designated as confidential shall be readily separable from the proposals in order to facilitate eventual public inspection of the non-confidential portion of the proposal.

If a request is received to inspect the portions of an Offeror's proposal designated as confidential, the inspection shall be subject to written determination by the Office of the Vice President for Legal Affairs and University General Counsel for confidentiality. If that office determines in writing that the material designated as confidential is subject to disclosure, the material shall be open to public inspection unless the Offeror files a protest in duplicate with the Director, OPRPM, within FIVE (5) working days after the protestor knows or should have known of the facts leading to the filing of the protest.

SECTION 2 SCOPE OF WORK

2.0 DEFINITIONS OF TERMS AND ACRONYMS

ADA - Americans with Disabilities Act of 1990.

API - Application Programming Interface.

Banner - Ellucian Student Information System.

Banner Central - University of Hawai'i unit providing services related to the implementation and management of Banner at the University of Hawai'i System.

Bidder or Offeror - Any individual, partnership, or corporation submitting directly or through a duly authorized representative or agent, a bid or proposal in response to an Invitation for Bids, a Request for Proposals, or an unpriced technical offer to an expression of interest.

Customer Relationship Management (CRM) - A system for managing a company's interactions with current and future customers (students).

DOE - State of Hawai'i Department of Education.

DIMS - Document Imaging and Management System.

EM - Enrollment Management.

EP - University of Hawai'i Executive Policy.

FERPA - Family Educational Rights and Privacy Act of 1974.

ITS - Information Technology Services. University of Hawai'i System Office which provides services across the broad range of computing and communications technologies that support learning, teaching, research, public services and administration.

OCR - Optical Character Recognition.

ODS - Ellucian Operational Data Store.

RDBMS - Relational Database Management System.

Scalable - Able to increase total throughput under an increased workload, maximum supported users, and storage capacity by adding additional resources, such as hardware and/or network bandwidth.

Single Sign-on - The ability for users to log on once to a network and be able to access authorized resources within the enterprise. A single sign-on program accepts the username and password and automatically logs on to all appropriate servers as requested.

UH - University of Hawai'i System.

UHM - University of Hawai'i at Mānoa.

2.1 BACKGROUND INFORMATION

A. University of Hawai'i

The University of Hawai'i System (UH) is a 10-campus system with SEVEN (7) community colleges and THREE (3) 4-year institutions with the University of Hawai'i at Mānoa (UHM) having the largest enrollment (approximately 19,000 students). The organizational structure of UHM includes SIX (6) admissions offices (Undergraduate, Graduate, Outreach College, Graduate Business, Law, and Medicine). The UH system has implemented the Ellucian Banner Student and Financial Aid software as the UH's integrated online student information system. The Banner Student Information System integrates services across different academic and student support functions for all TEN (10) UH campuses. The transactional database supporting the Banner system is using the Oracle RDBMS (Relational database management system) 11.1.2.2.0, and the system security is a role-based implementation. The Banner Identification Management team has responsibility over defining and approving group privileges and roles.

B. Communications Management Process

Currently UHM uses two approaches to manage communications with students. The first approach is the use of Banner communication plan forms to run automatically generated campaigns. Second is the use of discoverer reports to run ad hoc campaigns which are merged to letters and/or emails.

The Banner communication plan focuses primarily on First Time Freshmen and Transfers. When a communication plan is assigned to a student, their Banner record populates with the messages they are supposed to receive. Once the letters/emails are generated their records are updated to reflect that the message has been sent.

In the Ad Hoc campaigns, data is generated from banner in spreadsheets and then filtered to extract certain population types for targeted messages which are sent through email or mail.

Prospective student data is entered into Banner as new students or updates an already existing record. Prospective students are assigned a communication plan appropriate to their status. Rules are assigned to every message to control who receives the message.

The Banner communication plans are divided into three types, Recruits, Applicants and Accepted students. The recruit population is divided into three types, Recruiting High Priority (RHP), Recruiting Future Term (RFT) and Recruiting Test Score (RTS).

The RHP group is made up of prospective students who express interest in coming to UHM within the next two years. The RFT group is made up of prospective students interested in attending in the future. Finally, the RTS group is made up of prospective students who have submitted their test scores but have not applied for admission at the present time.

When a student applies to the University, the student is assigned to the Application plan (APPI). Once accepted, the Accepted student plan (ACC) is activated. Currently, the APPI and the ACC plans consist of emails that are sent to students.

The APPI plan has an email sent to the student that acknowledges the receipt of the application. There are two follow up emails as part of this plan that notifies students of missing documents in order to process the student's application.

The ACC plan has one email that is sent to notify the student that they have been accepted to the University of Hawai'i at Mānoa. A hard copy of the decision packet is still mailed to the student.

C. Benefits of a CRM

A Customer Relationship Management (CRM) system will help UHM interact with our clientele and improve our ability to run communication campaigns for different segments of our market. The CRM will improve our personal relationships with students, families and our community by having our business information stored in a single system. Internally the CRM will help to automate some of our business practices and allow staff to concentrate on other aspects of the recruitment/admissions process.

2.2. OVERVIEW OF THE SCOPE OF WORK

The Offeror shall provide a CRM solution for management of communications with students and other groups. The solution shall include the following features:

A. Concurrent User Option

FIVE (5) concurrent licenses shared by Enrollment Management, Office of Admissions, Office of the Registrar and Financial Aid Services personnel who use the system.

B. Technical Support

Provide technical support during and after implementation of CRM. Support shall be provided between 7:00 a.m. – 5:00 p.m. (Hawai'i Standard Time zone preferred) Monday – Friday.

C. Communication with UH Data source(s)

Retrieve student data from UH Data source(s) and update student's status as they move from prospect, applicant, accepted, enrolled and graduate stages of the student life cycle.

D. Multiple Communication Plans

Allow for students to be a part of multiple communication plans as needed, e.g. students who are currently in the prospect pool with interest in a particular field of study or a student with multiple applications.

E. Multiple Communication Types

Allow for students to receive messages based on the type of prospect they may be e.g. freshman or transfer or O'ahu student or Kaua'i student.

F. Email Marketing

Email marketing program to facilitate communication with students and others such as staff, high school and college counselors and evaluate success. Email program should provide responsive html email, google analytics, preview mode, test options, push to mobile view (Android and iOS), link checker, social media integration, inbox inspection to view in popular email domains, social follow, and track opens, clicks, and plain text clicks.

G. Mail

Provide ability to query data and generate spreadsheets to allow for generation of mailing labels, letters or other correspondence.

H. Phone Calls

Provide ability to query data and generate call lists, create call scripts, and record call data and comments on prospective records.

I. Reports

Provide reports, analytics, predictive modeling and geo metrics for the purpose of evaluating communication strategies and campaign effectiveness. Also provide data to guide recruit strategies.

J. Event Management

Allow scheduling of events, sending of invitations, collection of event information, sign ups, generation of tickets, scanable codes (eg. QR codes, bar codes etc.).

K. Batch upload

Permit the uploading of batches of data into the CRM for the purpose of tagging communicating with different groups e.g. SAT name buys, High School Counselors etc.

L. Test instance

Provide a test instance of CRM that will allow new and current communication plans to be tested and evaluated prior to implementation.

M. Purge process

System shall provide a mechanism to identify selected records for removal (purging) from the CRM.

N. Query Tools

CRM shall provide the ability for users (with appropriate privileges) to create custom queries to identify persons with specific characteristics.

O. Installation Type (Vendor Hosted)

The vendor shall be required to comply with University of Hawaii Executive Policy EP 2.215 (Data Governance). The contract shall address the following areas:

- Bind individuals to the agreement
- Agree on limitations on use of PII from education records
- Agree to not re-disclose
- Specify points of contact/data custodians
- Identify penalties
- Set terms for data destruction
- Include funding terms
- Maintain right to audit
- Identify and comply with all legal requirements
- Have plans to handle a data breach
- Define terms for conflict resolution
- Specify modification and termination procedures
- Institutional data is the property of the University of Hawai'i
- Institutional data shall be protected
- Institutional data shall be accessible according to defined needs and roles
- Language shall ensure that the data shall be returned to UH in the event that the agreement is terminated (via various means). Shall include provision for damages to ensure that UH does not lose information.

P. Security

Integrate and authenticate user access in accordance with UH security standards (such as CAS).

- 1) The UH utilizes a custom multi-institutional Banner environment employing security policies to segregate access to each campus' data.
 - a) The system shall be able to enforce security policies that will segregate data by campus; and
 - b) Security policies shall be implemented at an inter-campus level to restrict access to documents based on the campus affiliation of the staff member.
- 2) Enforcement of security is imperative to prevent unauthorized access. Documents and associated virtual notes may contain content that is confidential or of a sensitive nature and require additional access restrictions within an individual campus.

- a) Security policies shall also be in place to limit access to specific types of documents based on the user's official duties; and
- b) Access levels shall define a user's ability to: add/index, view, modify, and delete managed documents.

2.3 STATEMENT OF WORK

The Offeror shall work with UHM to provide and implement a Customer Relationship Management System.

A. Licensing

- 1) Application license fee to allow a minimum of two implemented environments (e.g. development and production installations) in vendor hosted scenarios.
- 2) User license fees for five (5) concurrent users.
- 3) Maintenance fees
 - a) Annual cost per year
 - b) Option to renew for FOUR (4) additional years

B. System Environment

- 1) Provide design and architecture:
 - a) Vendor hosted
 - b) Scalable
 - c) Interface with Banner Student Information System or Operational Data Store (ODS).

C. Implementation Services

- 1) Phase I: TBD
 - a) Information gathering regarding interface between CRM and Banner or ODS.
 - b) Establish development/test environment.
 - c) Test connectivity.
 - d) Set up accounts.
 - e) Define and create security roles.
 - f) Develop communication plan(s).
 - g) Provide administrator training.
 - h) Provide end-user training.

- 2) Phase II: TBD
 - a) Establish production environment
 - b) Go live

D. Training

- 1) Administrator training (Phase I)
 - a) System maintenance and support
- 2) End-user training (Phase I)
 - a) Communication plan development
 - b) Operational training

E. Custom Development

- 1) Vendor shall develop a communication plan.

2.4 MINIMUM QUALIFICATIONS

A. Offeror Minimum Qualification

Have expertise in installing/deploying Customer Relationship Management systems in institutions of higher education. The Offeror shall provide a list of *similar installations* (minimum of 3) successfully completed by the Offeror and available for inspection. "*Similar installations*" shall mean:

- 1) Equivalent to or larger in size or scope.
- 2) Utilization of the same or similar systems as proposed in the Offeror's response.

The following contact information shall be included in **APPENDIX D** for the above references:

Name of Company
Address of Company
Name of Contact
Address of Contact
Telephone Number
FAX Number
E-Mail Address
Business Description

The University may contact some or all of the references. The Offeror shall clear such contact with the reference so as to avoid any communication problems or "proprietary information" problems with the reference.

B. Qualification Requirements of Firm and Staff

The Offeror shall provide a comprehensive description of its ability to meet the staffing requirements outlined in this RFP. Included in the description will be resumes of project team assigned.

If subcontractor(s) are used, proposals shall include a statement from each, signed by and individual to legally bind the subcontractor, and stating:

- 1) The subcontractor's name, mailing address, telephone number, fax number, and contact person.
- 2) The general scope of work to be performed by the subcontractor.
- 3) The subcontractor's willingness to perform the work indicated.

C. Minimum Functional Requirements

- 1) Shall be easily maintained in a secure manner.
- 2) Shall integrate and authenticate user access following UH security standards.
- 3) Shall provide an easy-to-use browser front-end interface.
- 4) Shall have client customizable communication plans.
- 5) Shall be ADA compliant.
- 6) Shall generate reports on system performance and ad hoc user reports.
- 7) Shall match CRM entities against Banner PIDM or ODS PERSON_UID.
- 8) Shall accept batch import of prospects/constituents.

D. Minimum Technical Requirements

- 1) Shall have encrypt login and file transmissions.
- 2) Shall have Browser compatibility with Microsoft Windows and Macintosh operating systems.
- 3) Shall have vendor provided technical support for end-users and administrative users.
- 4) Shall be scalable.
- 5) Offeror to describe how product interfaces with Banner or ODS.

E. Training and Documentation

Offeror shall provide user manuals for all services selected by the University. Manuals shall be provided in both printed and electronic format. The University shall have the right to reproduce a sufficient number of manuals for internal use only.

Training shall be provided prior to implementation of the system as well as prior to any major system upgrades, as appropriate for administration and end users.

2.5 DESIRED FEATURES

Offeror must provide evidence of ability to interface their solution with the Banner system's Multi Institution Functionality.

2.6 TERM OF CONTRACT

The University will issue a Notice to Proceed at which time the Contractor shall install all equipment and software to provide and implement a Customer Relationship Management System and ensure that the CRM System is fully operational. Thereafter, the initial term of the contract shall be for a period of ONE (1) year commencing on the date of acceptance of the CRM System (start date to be determined), and thereafter shall be renewable from year to year, for a total of FIVE (5) years, without the necessity of rebidding, upon mutual agreement in writing, NINETY (90) days prior to the annual renewal date, contingent upon availability of funds. In addition, the University may terminate this contract at any time, upon THIRTY (30) days' prior written notice.

SECTION 3 PROPOSAL REQUIREMENTS

3.1 INTRODUCTION

This section indicates the proposal requirements for this RFP which shall be submitted by the deadline set for submission of proposals. Fulfillment of all proposal requirements listed is mandatory for consideration of proposals.

The Proposal shall include the following subsections:

- Proposal Letter
- Recent Experience
- Project Narrative
- References

3.2 PROPOSAL LETTER (Appendix A)

The Proposal Letter shown in Appendix A shall be signed by an individual authorized to legally bind the Offeror, dated, and be affixed with the corporate seal (if corporate seal is available). If said individual is not the corporate president, evidence shall be submitted showing the individual's authority to bind the corporation. The fully executed proposal letter shall be submitted along with the proposal.

3.3 OFFEROR'S EXPERIENCE (Appendix B)

Offeror shall complete and submit APPENDIX B, Recent (Within Last FIVE (5) Years) Experience

3.4 PROJECT NARRATIVE (Appendix C)

- A. A description of the company, including number of employees, number of years in business in Hawaii, a list of key company principals, and types of services provided.
- B. Project implementation plan (timeline)
- C. Licensing, Security, and Maintenance Support
- D. Technical Information and Requirements
- E. Training and Documentation
- F. Cost Proposal (Appendix E)
- G. Qualifications of Staff

3.5 REFERENCES/RECOMMENDATIONS (Appendix D)

Offerors shall provide a minimum of at least THREE (3) references who can attest to the reliability of the Offeror's service and personnel. Furnish the names of companies, addresses, phone numbers, and contact persons. The University reserves the right to contact the references for additional information.

3.6 COST PROPOSAL (Appendix E)

Offerors shall complete Appendix E and provide a cost proposal which includes all costs associated with the satisfactorily completion of the scope of work of this RFP. The budget must encompass all needs assessment, design, production, licensing operations (if applicable), training, support and software acquisitions necessary for the development and maintenance of this new website. All costs are presumed to be included unless otherwise indicated. Proposal shall include an annual and/or monthly cost for maintenance, back-up and recovery solutions. As part of the cost proposal, include the hourly rate charges for personnel and the number of hours those personnel will be working. Include costs, with itemization, for licensing, security maintenance, testing and training.

3.7 SAMPLES OF WORK

Offerors shall provide samples of work performed for THREE (3) other institutions of higher education. Samples will not be returned.

3.8 OFFEROR'S PROPOSAL SUBMITTALS CHECK LIST

The following checklist is provided to assist the Offeror in submitting the appropriate documents with their proposals:

- 1) _____ Business Classification Certification Statement
- 2) _____ Appendix A, Proposal Letter (if applicable, shall include a corporate seal and an Evidence of Authority if the individual signing the proposal on behalf of the company is not the corporate president)
- 3) _____ Appendix B, Offeror's Experience
- 4) _____ Appendix C, Project Narrative
- 5) _____ Appendix D, References
- 6) _____ Appendix E, Cost Proposal

SECTION 4 CRITERIA TO EVALUATE PROPOSALS

The evaluation of proposals received in response to the RFP will be conducted comprehensively, fairly, and impartially. Contracts will be awarded to responsive, responsible Offerors whose proposals are determined in writing to be the most advantageous to the University taking into consideration the evaluation factors set forth in this RFP.

4.1 EVALUATION PROCESS

An initial evaluation of all proposals received shall be conducted based on the criteria set forth below in Section 4.2, INITIAL EVALUATION. The evaluation committee will provide scores for each Offeror not to exceed the total possible points allowed (110) for the initial evaluation. The University will select the top THREE (3) Offerors receiving the highest score for the initial evaluation.

The top three Offerors as determined by the initial evaluation shall be required to give a web-based presentation of their proposal to the evaluation committee. The Technical Representative shall contact the top THREE (3) Offerors of the initial evaluation to schedule a date and time for the web-based presentations.

The final evaluation shall be based on the criteria set forth below in Section 4.3, FINAL EVALUATION. The evaluation committee will provide scores for each Offeror not to exceed the maximum amount of points allowed (120) for the final evaluation (the score from the initial evaluation will be carried over to the final evaluation).

Award of the contract if awarded, shall be made to the Offeror receiving the highest score for the final evaluation.

The University reserves the right to bypass the initial evaluation and move straight into the final evaluation in the event that only THREE (3) proposals or less are received.

4.2. INITIAL EVALUATION - (110 Total Points Maximum)

Proposal Format - Offeror's proposal shall respond to each of the following requests in the order indicated. Each response shall be identified by its own numbered tab within the proposal for ease of reference. The total length of the proposal should not exceed 50 pages. A committee will evaluate and score each proposal submitted and selection of winning Offeror shall be based on the following criteria and not solely on the lowest price.

4.2.1. Background and Experience of Firm (16 Points Maximum)

Provide an overview of your organization including information on size, organizational structure, location(s), ownership and affiliations, and years of experience in document imaging and management, and workflow. Criteria to be evaluated may include, but is not limited to, the following:

- A. Does the Offeror have a strategic commitment to higher education?
(4 Points Maximum)
- B. How long has the Offeror been in business? (4 Points Maximum)
- C. Has the Offeror demonstrated ability to successfully implement solutions and retain effective working relationships with their client base?
(4 Points Maximum)
- D. Do the references represent institutions comparable to UHM?
(4 Points Maximum)

4.2.2 Technical Work Plan (40 Points Maximum)

Provide a technical work plan, including a project breakdown and a timeline for each event, task and decision point in the work plan. Criteria to be evaluated may include, but are not limited to, the following:

- A. Does the Offeror understand the needs of UHM to satisfy the requirements of the RFP? (5 Points Maximum)
- B. Does the implementation plan meet the July 2015 go-live date?
(5 Points Maximum)
- C. Does the Offeror provide evidence of ability to interface directly with Banner, preferably using API's? (5 Points Maximum)
- D. How usable is the end-user interface in regards to displaying both CRM and Banner information? (5 Points Maximum)
- E. Does Offeror provide an adequate service level agreement?
(5 Points Maximum)

- F. Has the Offerors submitted a plan to provide suitable (accessible/qualified) staffing to service UHM under the contract? (5 Points Maximum)
- G. Does the Offeror provide administrative and end-user training (including manuals)? (5 Points Maximum)
- H. What level of support will be provided given that the UHM is located in the Hawai'i Standard time zone? (5 Points Maximum)

4.2.3. Cost Proposal (30 Points Maximum)

Provide cost proposals to accomplish the scope of this RFP (See Section 3.6, COST PROPOSAL (Appendix E). The budget must encompass all needs assessment, design, production, licensing operations (if applicable), training, support and software acquisitions necessary for the development and maintenance of this new website. All costs are presumed to be included unless otherwise indicated. Proposal shall include an annual and/or monthly cost for maintenance, back-up and recovery solutions. As part of the cost proposal, include the hourly rate charges for personnel and the number of hours those personnel will be working. Include costs, with itemization, for licensing, security maintenance, testing and training. Criteria to be evaluated may include, but are not limited to, the following:

- A. Is the pricing proposed competitive and reasonable?

Price Evaluation Formula

Since Cost Proposal involves price as an evaluation factor, this section shall be rated as follows:

The proposal that offers the lowest price for this section shall receive the designated maximum available points for this particular section. The points allocated to higher priced proposals shall be equal to the lowest proposal price multiplied by the maximum points available for proposal price, divided by the higher proposal price.

Example: Proposed Cost where maximum available rating is 30 points

Offeror A's Price - \$5,000 (Lowest Price) – awarded 30 Points

Offeror B's Price - \$6,000 (Higher Price) – awarded 25.00 Points (see calculation)

Offeror C's Price - \$7,000 (Highest Price) – awarded 21.43 Points (see calculation)

Since Offeror A offers the lowest price, Offeror A receives the 30 point maximum. For Offerors B and C, the awarded points would be calculated as:

Offeror B: $5,000 \times 30 = 150,000 / 6,000 = 25.00$ pts.

Offeror C: $5,000 \times 30 = 150,000 / 7,000 = 21.43$ pts.

4.2.4. Quality of Previous Work (10 Points Maximum)

List comparable higher education institutions your company has implemented CRM solutions that best reflect relevancy to this project. Criteria to be evaluated may include, but are not limited to, the following:

- A. Does the Offeror have a proven track record of its capability to perform the requirements of this RFP? (5 Points Maximum)
- B. Does the Offeror have a sound reputation and developed goodwill in the information technology industry and business community? (5 Points Maximum)

4.2.5. Project Staff (9 Points Maximum)

Identify the projects organizational structure and the name and title of personnel assigned to the project. Provide summaries of the professional biographies and experience of all persons who shall perform work under the contract. Also include the name of the program manager for the project and contact information.

- A. Did the Offeror provide an organizational structure? (3 Points Maximum)
- B. Did the Offeror provide summaries of persons who shall work under the contract? (3 Points Maximum)
- C. Did the Offeror identify a project manager? (3 Points Maximum)

4.2.6. Other Factors (5 Points Maximum)

Please include any other services or ideas not mentioned in the Scope of Services that you are willing to provide as part of the contract. Please provide a detailed description of these services and itemized costs (e.g. online chat, texting, video conferences or webinars). (5 Points Maximum)

- 4.3 All acceptable proposals will be evaluated by a committee composed of various members of the University of Hawaii at Manoa, based on the criteria listed in this RFP and whether the proposal sufficiently answers these questions:

- 4.3.1. Does the Offeror have a good understanding of the requirements of this RFP?
- 4.3.2. Does the proposal fulfill the requirements of this RFP?
- 4.3.3. Does the proposal address all features, functionalities, and requirements for the CRM?
- 4.3.4. Does the proposal incorporate new technology platforms and industry practices?

- 4.3.5. Does the proposal provide sufficient security to restrict access for different users and safeguard all data in the System?
- 4.3.6. Does the proposal demonstrate that the System will be effective, efficient, and user-friendly?
- 4.3.7. Does the Offeror clearly state the steps and effort needed to install, deploy, and host the new System, including connection to the UH data systems?
- 4.3.8. Does the Offeror have a proven track record of its capability to perform the requirements of this RFP?

4.4 **FINAL EVALUATION - (120 Total Points Maximum)**

- A. Initial Evaluation Score Maximum of 110 points
- B. Web-based Presentation of Offeror's Customer Relationship Management (CRM) System for Enrollment Management Maximum of 10 points

Offeror shall present to the evaluation committee a web-based presentation demonstrating how Offeror's system meets or exceeds the University's technical specifications for a Customer Relationship Management (CRM) System. Offeror's presentation shall not exceed **SIXTY (60) minutes**.

- 4.5 Evaluations will be based on overall services to be provided, qualifications, experience and costs. A contract may or may not necessarily be awarded to the vendor submitting the lowest cost proposal.

4.6 Criteria:

Background and experience of firm	(Section 4.2.1.)	16 points
Technical work plan	(Section 4.2.2.)	40 points
Cost and budget	(Section 4.2.3.)	30 points
Quality of previous work	(Section 4.2.4.)	10 points
Quality of project staff	(Section 4.2.5.)	9 points
Other factors	(Section 4.2.6.)	5 points
Web based presentation	(Section 4.4B.)	10 points

SECTION 5 SPECIAL PROVISIONS

5.1 SCOPE

The Providing of Customer Relationship Management (CRM) System for Enrollment Management for Office of Admissions, University of Hawaii at Manoa, Honolulu, Hawaii shall be in accordance with the terms and conditions of RFP No. 15-0265 and the General Provisions dated September, 2013 included by reference. Copies of the General Provisions are available at the Office of Procurement and Real Property Management, University of Hawaii, 1400 Lower Campus Road, Room 15, Honolulu, Hawaii 96822 or the General Provisions may be viewed at:
<http://www.hawaii.edu/oprpm/docs/GP0913.pdf>

5.2 REFERENCES

The University reserves the right to contact the references named in Appendix D, REFERENCES, and to reject a proposal submitted by any Offeror whose performance on other projects has been unsatisfactory.

5.3 PURCHASE ORDERS/PAYMENT

The University shall issue purchase orders for services and all purchase orders issued hereunder shall reference the contract number and shall be subject to the terms and conditions of this contract. This contract shall control in the event of conflict with any purchase order.

Payment by the University shall be made in accordance with Section 103-10, Hawaii Revised Statutes.

5.4 OPENING OF PROPOSALS

Proposals will be opened at the date and time specified in Subsection 1.4, SCHEDULE OF KEY DATES, or as amended, at the proposal submittal office. The proposal opening will not be open to the public. Proposals may be available for public inspection upon notice of award and shall be available for public inspection after the contract is signed by all parties.

5.5 CONTRACT INVALIDATION

If any provision of this contract is found to be invalid, such invalidation will not be construed to invalidate the entire contract.

5.6 CONFIDENTIAL INFORMATION

Offeror shall designate in writing those portions of the unpriced proposal that contain designated trade secrets or other proprietary data that are to remain confidential. The material designated as confidential shall be readily separable from the proposal in order to facilitate public inspection of the non-confidential portion of the proposal.

5.7 SOFTWARE

The University will execute Software License Agreements, if necessary, as long as the terms and conditions of the License Agreements do not conflict with the terms and conditions of this RFP. Inasmuch as the Contractor will be selecting the software for the University, the standard waivers of warranties or merchantability and fitness for a particular purpose shall not be accepted. The University shall be protected from claims of copyright infringement not occasioned by University modification of the software.

5.8 PROTECTION AND HANDLING OF DATA

A. Definitions:

- 1) Institutional Data - Institutional data is defined as data elements that are created, received, maintained and/or transmitted by the University in the course of meeting its administrative and academic requirements. Institutional data is the property of the University and shall be managed as a key asset. Institutional data shall be managed through defined governance standards, policies and procedures. Data is categorized in two ways: Public Information and Sensitive Information.
- 2) Public Information - any information to which access is not restricted.
- 3) Sensitive Information - Sensitive Information is subject to privacy considerations or has been classified as confidential and subject to protection from public access or appropriate disclosure. Examples of Sensitive Information include but are not limited to: student records, including anything protected by the Family Educational Rights and Privacy Act (FERPA); Health information, including anything covered by the Health Insurance Portability and Accountability Act (HIPAA); Personal financial information such as credit card information, bank account information, debit card information, etc. Job applicant records (names, transcripts, etc.); Social Security Numbers; Dates of birth; Private home addresses and phone numbers; driver license numbers and State ID Card numbers; access codes, passwords and PINs for online information systems; Answers to "security questions" such as "what is the name of your favorite pet?", confidential information subject to attorney-client privilege; detailed information about security systems; (physical and/or network); Confidential salary information; information made confidential by a collective bargaining agreement.

To the extent there is any uncertainty as to whether any data constitutes Sensitive Information, the data in question shall be treated as Sensitive Information until a determination is made by the University or proper legal authority.

- B. Data Confidentiality. Contractor shall implement appropriate measures (including written agreements signed by Contractor personnel with access to data) designed to ensure the confidentiality and security of Sensitive Information, protect against any anticipated hazards or threats to the integrity or security of such information, protect against unauthorized access or disclosure of information, and prevent any other action that could result in substantial harm to the University or an individual identified with the data or information in the Contractor's custody, as applicable.
- C. Compliance with Laws and University Policies and Procedures. Contractor agrees to comply with all applicable state and federal laws, regulations, and University policies pertaining to information designated as private, protected, sensitive or confidential by law or by the University, including, but not limited to, EP2.210 (Use and Management of Information Technology Resources), EP2.214 (Security and Protection of Sensitive Information), AP7.022 (Procedures Relating to Protection of the Educational Rights and Privacy of Students), Hawai'i Revised Statutes (HRS) §487J (Social Security Number Protection), HRS §487N (Security Breach of Personal Information), HRS §487R (Destruction of Personal Information Records), and Act 10, Part V, 2008 Special Session, Session Laws of Hawai'i; the Family Educational Records Protection Act (FERPA), Health Information Privacy and Accountability Act (HIPAA), and the Gramm-Leach Bliley Act (GLBA). Contractor shall obtain and maintain all necessary permits, licenses and certificates required to provide for the delivery of service.
- D. Network Security. Contractor agrees at all times to maintain network security within the hosted environment that- at a minimum - includes: network firewall provisioning, intrusion detection, and regular (three or more annually) third party vulnerability assessments. Likewise, Contractor agrees to maintain network security that conforms to generally recognized industry standards and best practices.
- E. Application Security. Contractor agrees at all times, when Customer is covered under a paid-up application maintenance and support agreement, to provide, maintain and support its Software and subsequent updates, upgrades, and bug fixes such that the Software is, and remains secure from those vulnerabilities.
- F. Data Security. Contractor agrees to protect and maintain the security of data with protection security measures that include maintaining secure environments that are patched and up to date with all appropriate security updates as designated by a relevant authority (e.g. Microsoft notifications, etc.). Likewise Contractor agrees to conform to the following measures to protect and secure data:

- 1) Data Transmission. Contractor agrees that any and all transmission or exchange of system application data with the University and other parties shall take place via secure means, e.g. HTTPS, FTPS, SFTP or equivalent means.
 - 2) Data Storage and Backup. Contractor agrees that any and all University data will be stored, processed, and maintained solely on designated servers and that no University data at any time will be processed on or transferred to any portable or laptop computing device or any portable storage medium, unless that storage medium is in use as part of the Contractor designated backup and recovery processes. All servers, storage, backups, and network paths utilized in the delivery of the service shall be contained within the states, districts, and territories of the United States unless specifically agreed to in writing by an agent of the University with designated data, security, or signature authority. Contractor agrees to store all University backup data stored, in Contractor's possession, as part of its backup and recovery processes in encrypted form, using no less than 128 bit key.
 - 3) Data Re-Use. Contractor agrees that any and all data exchanged shall be used expressly and solely for the purposes enumerated in the Agreement. Data shall not be distributed, repurposed or shared across other applications, environments, or business units of the Contractor. The Contractor further agrees that no University data of any kind shall be revealed, transmitted, exchanged or otherwise passed to other vendors or interested parties except on a case-by-case basis as specifically agreed to in writing by a University officer with designated data, security, or signature authority.
 - 4) Data Encryption. Contractor agrees to store all University backup data, as applicable, as part of its designated backup and recovery processes in encrypted form, using a commercially supported encryption solution. Contractor further agrees that any and all University data defined as personally identifiable information under current legislation or regulations stored on any portable or laptop computing device or any portable storage medium is likewise encrypted.
- G. End of Agreement Data Handling. Contractor agrees that upon termination of this Agreement it shall return all data to the University in a useable electronic form, and erase, destroy, and render unreadable all University data in its entirety in a manner that prevents its physical reconstruction through the use of commonly available file restoration utilities, and certify in writing that these actions have been completed within 30 days of the termination of this Agreement or within 7 days of the request of an agent of the University, whichever shall come first.
- H. Data Breach. Contractor agrees to comply with all applicable laws, including but not limited to Chapter 487N, HRS (Security Breach of Personal Information), that require the notification of individuals in the event of unauthorized release of personally identifiable information or other event requiring notification. In the event

of a breach of any of the Contractor's security obligations, or other event requiring notification under applicable law due to breach of Contractor's security obligations, Contractor agrees to:

- 1) Notify the University by telephone and e-mail of such an event within 24 hours of discovery, and
 - 2) Assume responsibility for informing all such individuals in accordance with applicable law, and
 - 3) Indemnify, hold harmless and defend the University and its trustees, officers, and employees from and against any claims, damages, or other harm related to such Notification Event.
- I. Right to Audit. Contractor agrees that, as required by applicable state and federal law, auditors from state, federal, University System, or other agencies so designated by the State or University, shall have the option to audit the procured service. Records pertaining to the service shall be made available to auditors and the University during normal working hours for this purpose.
- J. Mandatory Disclosure of Protected Information. If the Contractor becomes compelled by law or regulation (including securities' laws) to disclose any Protected Information, the Contractor will provide the University with prompt written notice so that the University may seek an appropriate protective order or other remedy. If a remedy acceptable to the University is not obtained by the date that the Contractor must comply with the request, the Contractor will furnish only that portion of the Sensitive Information that it is legally required to furnish, and the Contractor shall require any recipient of the Sensitive Information to exercise commercially reasonable efforts to keep the Sensitive Information confidential.
- K. Remedies for Disclosure of Confidential Information. Contractor and the University acknowledge that unauthorized disclosure or use of Sensitive Information may irreparably damage the University in such a way that adequate compensation could not be obtained from damages in an action at law. Accordingly, the actual or threatened unauthorized disclosure or use of any Sensitive Information shall give the University the right to seek injunctive relief restraining such unauthorized disclosure or use, in addition to any other remedy otherwise available (including reasonable attorneys' fees). Contractor hereby waives the posting of a bond with respect to any action for injunctive relief. Contractor further grants the University the right, but not the obligation, to enforce these provisions in the Contractor's name against any of the Contractor's employees, officers, board members, owners, representatives, agents, contractors, and subcontractors violating the above provisions.

- L. Survival. The confidentiality obligations shall survive termination of any agreement with Contractor for a period of ten (10) years or for so long as the information remains confidential, whichever is longer.

5.9 PAYMENT

The Contractor shall be remunerated upon submission of a properly executed original invoice and ONE (1) copy, indicating the contract number, to: University of Hawai'i, at Manoa, Enrollment Management, 2600 Campus Road, QLC 214, Honolulu, Hawaii..96822.

**APPENDIX A
PROPOSAL LETTER
UNIVERSITY OF HAWAII**

We propose to furnish and deliver any and all of the deliverables and services named in the Request for Proposals (RFP) to provide Customer Relationship Management (CRM) System for Enrollment Management for Office of Admissions, University of Hawaii at Manoa, Honolulu, Hawaii, RFP No. 15-0265, for which prices shall be negotiated.

It is understood that this proposal constitutes an offer.

It is understood and agreed that we have read the University of Hawaii's specifications described in the RFP and that this proposal is made in accordance with the provisions of such specifications. By signing this proposal, we guarantee and certify that all items included in this proposal meet or exceed any and all such specifications.

We agree, if awarded the contract, to deliver goods or services which meet or exceed the specifications.

Respectfully submitted,

Legal Name of Offeror

Date

Authorized Signature (original) (Typed Name)

Title

Street Address

Telephone No.

City, State, Zip Code

Fax No.

Social Security OR Federal Tax Payer ID No.

Hawaii General Excise Tax License No.

Remittance Address (if different from street address)

City, State, Zip Code

Location of Offeror's Plant

Offeror is: ☐ Individual ☐ Partnership ☐ Corporation* ☐ Joint Venture

State of Incorporation: ☐ Hawaii ☐ Other:

Is Corporate Seal Available In Hawaii: ☐ Yes** ☐ No

* Attach to this page evidence of authority of the above officer to submit an offer on behalf of the corporation, giving also, the names and addresses of the other officers.

** If yes, affix corporate seal.

APPENDIX B

OFFEROR'S EXPERIENCE (WITHIN LAST FIVE [5] YEARS) TO PROVIDE CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEMS

1. Include any relevant experience that indicates the qualifications of the offeror for the performance of the potential contract.

2. Include a list of companies or institutions (minimum of THREE [3] firms) that the Offeror has had contracts with during the last FIVE (5) years that relate to the Offeror's ability to perform the work required under this RFP.

<u>Name & Address of Company/Institution</u>	<u>Contact Person</u>	<u>email address</u>	<u>Telephone Number</u>	<u>Contract Period</u>	<u>Description of Services</u>
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1.

2.

3.

NOTE: Offerors may use this form or separate sheet(s) in another format, provided all information requested is supplied.

**APPENDIX C
PROJECT NARRATIVE**

- A. Description of the company, including number of employees, number of years in business in Hawaii, a list of key company principals, and types of services provided.
- B. Project implementation plan (timeline)
- C. Licensing, Security, and Maintenance Support
- D. Technical Information and Requirements
- E. Training and Documentation
- F. Cost Proposal
- G. Qualifications of Staff

NOTE: Offerors may use this form or separate sheet(s) in another format, provided all information requested is supplied.

APPENDIX D REFERENCES

Provide the name of client/company, address, contact person name, address of contact, phone number, fax number, email address, and business description for at least THREE (3) client references.

REFERENCE #1:	
Name of Client/Company	
Address:	
Contact Person's Name:	
Address of Contact:	
Phone Number:	
Fax Number:	
Email Address:	
Business Description	

REFERENCE #2:	
Name of Client/Company	
Address:	
Website Address:	
Contact Person's Name:	
Phone Number:	
Email Address:	
Services Provided	

REFERENCE #3:	
Name of Client/Company	
Address:	
Website Address:	
Contact Person's Name:	
Phone Number:	
Email Address:	
Services Provided	

NOTE: Offerors may use this form or separate sheet(s) in another format, provided all information requested is supplied.

APPENDIX E COST PROPOSAL

Offerors shall complete Appendix E and provide a cost proposal which includes all costs associated with the satisfactory completion of the scope of work of this RFP. The budget must encompass all needs assessment, design, production, licensing operations (if applicable), training, support and software acquisitions necessary for the development and maintenance of this new website. All costs are presumed to be included unless otherwise indicated. Proposal shall include an annual and/or monthly cost for maintenance, back-up and recovery solutions. As part of the cost proposal, include the hourly rate charges for personnel and the number of hours those personnel will be working. Include costs, with itemization, for licensing, security maintenance, testing and training.

A. Offeror's Total Contract Cost for the complete implementation of CRM System and delivery of services for an initial period of ONE (1) year. Thereafter, the contract shall be renewable from year to year, for a total of FIVE (5) years \$ _____

B. Cost Breakdown

- 1) License and Maintenance based on FIVE (5) concurrent end-users and enrollment of 20,000 (including software upgrades, enhancements, troubleshooting, fixes, patches, etc.) for ONE (1) year \$ _____
Option renewal for 2nd year \$ _____
Option renewal for 3rd year \$ _____
Option renewal for 4th year \$ _____
Option renewal for 5th year \$ _____
- 2) Labor, materials, supplies and applicable taxes. \$ _____
- 3) Planning and preparation \$ _____
- 4) On-Site training for administrators \$ _____
- 5) On-Site training for end-users \$ _____
- 6) Technical support \$ _____
- 7) Admin and end-user documentation/manuals \$ _____

Offeror's total cost shall include all staff/labor costs, administrative costs, material costs, equipment costs, license fees, maintenance fees, shipping and handling charges, insurance, training costs, travel costs, meals, lodging, transportation, all applicable taxes, and any other expenses required to accomplish the Scope of Services under the contract.

NOTE: Offerors may use this form or separate sheet(s) in another format, provided all information requested is supplied.

**APPENDIX F
PROPOSAL EVALUATION CRITERIA MATRIX**

**RFP NO. 15-0265 - TO PROVIDE CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM FOR
FOR ENROLLMENT MANAGEMENT FOR OFFICE OF ADMISSIONS, UNIVERSITY OF HAWAII**

INITIAL EVALUATION

Item	Qualification Criteria	Comments	Max Pts.	Points Awarded
4.2.1. Background and Experience of Firm - (16 Points Maximum)				
A.	Does the Offeror have a strategic commitment to higher education?		4	
B.	How long has the Offeror been in business?		4	
C.	Has the Offeror demonstrated ability to successfully implement solutions and retain effective working relationships with their client?		4	
D.	Do the references represent institutions comparable to UHM?		4	
	TOTAL SECTION POINTS		16	
4.2.2. Technical Work Plan (40 Points Maximum)				
A.	Does the Offeror understand the needs of UHM to satisfy the requirements of the RFP?		5	
B.	Does the implementation plan meet the July 2015 go-live date?		5	
C.	Does the Offeror provide evidence of ability to interface directly with Banner, preferably using API's?		5	
D.	How usable is the end-user interface in regards to displaying both CRM and Banner information?		5	
E.	Does Offeror provide an adequate service level agreement?		5	
F.	Has the Offerors submitted a plan to provide suitable (accessible/qualified) staffing to service UHM under the contract?		5	
G.	Does the Offeror provide administrative and end-user training (including manuals)?		5	
H.	What level of support will be provided given that UHM is located in the Hawai'i Standard time zone?		5	
	TOTAL SECTION POINTS		40	
4.2.3. Cost Proposal - (30 Points Maximum)				
A.	<p>Is the price proposed competitive and reasonable? Cost Proposal, Offeror's Total Cost as specified in Section 3.6. The proposal that offers the lowest price for this section shall receive the designated maximum available points (30) for this particular section. The points allocated to higher priced proposals shall be equal to the lowest proposal price multiplied by the maximum points available for proposal price, divided by the higher proposal price.</p> <p>Formula: Points Awarded = (A x 30) / B "A" = Lowest total cost price proposal "B" = This Offeror's total cost price proposal 30 = Maximum available points for this section</p>	$\left(\frac{\text{"A"} \times 30}{\text{"B"}} \right) = \text{Points Awarded}$	30	
	TOTAL SECTION POINTS		30	

**RFP NO. 15-0265 - TO PROVIDE CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM FOR
FOR ENROLLMENT MANAGEMENT FOR OFFICE OF ADMISSIONS, UNIVERSITY OF HAWAII**

INITIAL EVALUATION (CONTINUED)

Item	Qualification Criteria	Comments	Max Pts.	Points
4.2.4. Quality of Previous Work - (10 Points Maximum)				
A.	Does the Offeror have a proven track record of its capability to perform the requirements of this RFP?		5	
B.	Does the Offeror have a sound reputation and developed goodwill in the information technology industry and business community?		5	
	TOTAL SECTION POINTS		10	
4.2.5. Project Staff - (9 Points Maximum)				
A.	Did the Offeror provide an organizational structure?		3	
B.	Did the Offeror provide summaries of persons who shall work under the contract?		3	
C.	Did the Offeror identify a project manager?		3	
	TOTAL SECTION POINTS		9	
4.2.6. Other Factors - (5 Points Maximum)				
	Please include any other services or ideas not mentioned in the Scope of Services that you are willing to provide as part of the contract. Please provide a detailed description of these services and itemized costs e.g. online chat, texting, video conferences or webinars.		5	
	TOTAL SECTION POINTS		5	
	TOTAL INITIAL EVALUATION POINTS (110 Points Maximum)		110	

FINAL EVALUATION

Item	Qualification Criteria	Comments	Max Pts.	Points Awarded
4.4 Final Evaluation - (10 Points Maximum)				
A.	Total Initial Evaluation Points (carried over from Section 4.2)		110	
B.	Web-based Presentation of Offeror's Document Customer Relationship Management (CRM) System for Enrollment Mgmt.		10	
	TOTAL FINAL EVALUATION POINTS (120 Points Maximum)		120	

**RFP NO. 15-0265 - TO PROVIDE CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM FOR
FOR ENROLLMENT MANAGEMENT FOR OFFICE OF ADMISSIONS, UNIVERSITY OF HAWAII**

Item	Qualification Criteria	Comments
4.3	All acceptable proposals will be evaluated by a committee composed of various members of the University of Hawaii at Manoa, based on the criteria listed in this RFP and whether the proposal sufficiently answers these questions:	
4.3.1	Does the Offeror have a good understanding of the requirements of this RFP?	
4.3.2	Does the proposal fulfill the requirements of this RFP?	
4.3.3	Does the proposal address all features, functionalities, and requirements for the CRM?	
4.3.4	Does the proposal incorporate new technology platforms and industry practices?	
4.3.5	Does the proposal provide sufficient security to restrict access for different users and safeguard all data in the System?	
4.3.6	Does the proposal demonstrate that the System will be effective, efficient, and user-friendly?	
4.3.7	Does the Offeror clearly state the steps and effort needed to install, deploy, and host the new System, including connection to the UH data systems?	
4.3.8	Does the Offeror have a proven track record of its capability to perform the requirements of this RFP?	